MARCH 17, 1986

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CableVision

THE NEWS AND FEATURES WEEKLY OF THE CABLE TELEVISION INDUSTRY

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THE REFRANCHISING PUSH: GETTING MARKET FRIENDLY

CableVision

LEADING THE WEEK

Signal theft 15
The NCTA and MPAA will jointly provide funding and increased support to COST to establish a resource center for the battle against signal theft.

Promotion kits 16
The Cable Advertising Bureau is introducing operators to a local audience promotional plan that will include a full range of satellite- and mail-delivered material.

Sports return 20
After a decade without sports coverage, Showtime has announced that it will step into the ring to launch a series of boxing matches as early as March 25.

Scrambled sports 20
ESPN President Bill Grims announced that the cable network will begin scrambling its broadcasts sometime in December.

Color gamble 24
MGM and 20th Century-Fox both announced that they will be converting large numbers of black-and-white films into color in hopes that the colorization appeals to the cable network buyers.

Monitoring 26
Westinghouse is making available an automated survey system that allows cable operators to monitor customer satisfaction.

Boxing doubleheader 28
A March 10 PPV boxing event beamed to 156 systems for a potential audience of 3.6 million viewers resulted in heavy impulse buying.

Cable ad channel 30
Numedia Corp. and Tribune Media Services have jointly formed a turnkey system that allows operators to create a "color still photograph ad channel."

Cable industry converges on Dallas this week

Selling out 30
TCI officials say they will sell the company's 50 percent share of TeleScripps to its partner, Scripps Howard.

Cable '86 convention 34
Texas is the appropriate backdrop for this year's annual convention of the National Cable Television Association, which is expected to reverse the trend of a dwindling number of exhibitors.

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Showtime/TMC will be marketing its pay services to TVRO owners at a retail rate that undercuts the price commanded by HBO/Cinemax.

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Cable subscribers will get a peek at the HBO service when the company airs *Comic Relief*, a live comedy benefit show, to basic and pay audiences free of charge.

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Making a direct pitch to college and university professors, C-SPAN hopes to use its coverage of government as an educational tool for students.

Cover Story 44
Cable managers gathered at a Florida convention to explore the question of refranchising in light of new parameters established by the Cable Act of 1984. Included in the refranchising story package is an examination of local political postures and a case study of how one renewal negotiation was approached. Cover artist is Chris Butler.

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Marketing 81
Door-to-door cable sales forces are discovering that public preconceptions are the biggest hurdle to overcome when selling their product.

On Demand 90
Twentieth Century-Fox is launching its biggest PPV promotion to date with the release of *Cocoon*, the studio's $80 million box-office hit of 1985.

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Despite a tough operating environment that persisted throughout 1985, companies with cable holdings turned in solid operating performances.

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CAB report finds cable still gaining at broadcast expense

NEW YORK—Some individual networks may have adverse ratings at the moment, but on the whole national advertiser-supported cable continues to chip away viewing shares from broadcast networks and stations.

That's the perspective advocated in *1986 Cable TV Facts*, the latest edition of Cabletelevision Advertising Bureau's annual reference digest. About 50,000 copies of the 40-page booklet were printed earlier this month and will be distributed among members of the trade group, concurrent with its release to advertising agencies, sponsors, the media and financial community representatives. CAB has been producing an annual guide of this nature since 1984.

Facts' presentation comes in the wake of recent A.C. Nielsen reports concluding that several cable services ended 1985 with monthly or fourth-quarter ratings equal to or below ratings achieved the previous quarter or year. MTV's situation is the most celebrated; the rock video music network declined to release its fourth-quarter 1985 Nielsen numbers, after suggesting that fluctuations existed in the sample base that affected ratings from its key age 12-14 and 18-24 demographics.

Sources claimed MTV received a 24-hour .6 average rating for the quarter, down from a fourth-quarter 1984 .9 rating and one published report last week estimated that MTV stands to lose $7 million through make-goods advertising this year as a result. Nielsen officials feel MTV's charge has merit and are investigating the situation.

More recently, MTV's Nickelodeon reported an average .9 rating and 2 share of audience for its 7 a.m.-8 p.m. EST schedule during the last three months of 1985, equaling its third-quarter 1985 marks. Nielsen also recorded an average 24-hour .7 fourth-quarter rating for ESPN, identical to figures released last year.

Other ad-supported basics have reported upticks in their most recent total day Nielsen ratings. The Nashville Network managed a .7 rating average last November, higher than the .5 rating average produced the year before.

Many of the guide's statistics are derived from various A.C. Nielsen reports produced last year, and on the basis of that data, CAB concludes that aggregate ad-supported cable viewing is increasing. According to one 1985 study, broadcast network affiliates are drawing a 56 share among all cable households on a 24-hour daily basis, with ad-supported cable holding a 24 share, pay services receiving an 11 share and independents maintaining a 12 share, as opposed to a 19 share within the non-cabled universe. The broadcast share declines to 51 among pay households, while ad-supported services maintain their 24 share and pay networks increase their viewing share to 18.

Discrepancies in Nielsen's sample base comprise just one of the reasons why certain services are seeing their ratings drop, CAB President Bob Alter maintained. "As cable nets grow and more upgraded systems get turned on, the number of high-channel capacity affiliates they have increases, and that means they are competing for viewers with more services.

"You place a service in a 36- or 60-channel system and a lower rating will result because more choices are available," Alter said. "That's a fact that must be kept in mind. But the data also show that overall cable viewing is up; networks that see their ratings at the same level from quarter to quarter still achieve higher audience levels because the subscriber base is higher."

The publication represents more than just an illustrated data compilation that reinforces that view, Alter added. "It shows that, contrary to general opinion, there's a lot of available information out there that documents not only cable's value as an ad medium, but some significant guidelines over how cable subscribers use their TV sets." For example, cable programs achieve a higher viewing share among pay households in July than at any other time of the year, judging from another Nielsen study.

Elsewhere in *Facts*, CAB takes aim at growing speculation within the ad community that barter syndicated programs will take over cable's role as the major alternative to broadcast net buys by suggesting that the top 24 barter ad programs are achieving a six percent underdelivery rate among all cable homes and a 10 percent underdelivery rate among pay households.

"Most barter syndication goes on independent stations, and a myth that indies are the main recipients of the audience leaving the broadcast networks has surfaced."

—*Simon Applebaum*

Cable advertising revenues

	1984	1985	1986 Projection
Network	$460 million	$606 million	$800 million
Local	$ 86 million	$129 million	$193 million
Total	$546 million	$735 million	$994 million

Source: CAB/Paul Kagan Associates

Top 10 cable network advertisers/1984-85*

Company	Billings
Procter & Gamble	$30,487,371
Philip Morris	$21,061,420
Anheuser-Busch	$15,345,131
General Mills	$12,144,905
Time Inc.	$11,006,706
Mars Inc.	$ 8,163,657
R.J. Reynolds	$ 7,530,852
Thompson Medical	$ 7,060,414
Ford	$ 6,159,088
Kellogg's	$ 4,554,186

*Chart covers buys made on CBN, CNN, ESPN, MTV, USA and WTBS
Source: CAB/Broadcast Advertiser Reports

1985 financial roundup

Cable companies navigate rough year in good shape

NEW YORK—Companies with cable holdings turned in solid operating performances in 1985 despite what analysts termed a "tough" operating environment in which pay revenues often fell below expectations. In most cases, shortfalls in pay were made up by increased penetration rates and revenues in basic, they said.

More important for the industry, said observers, were cash flows that continued their upward climb. Average growth in cash flow was well above 20 percent, according to figures compiled by Kidder, Peabody securities analyst Mary Kukowski. She cautioned, however, that further slowing in pay unit growth and increases in basic programming costs are likely to slow cash flow growth in 1986.

Performance in net income was mixed with some companies such as Adams-Russell showing strong 21 percent gains in profitability, while TCI, a company known for its focus on building asset value, had a drop of 41 percent in net income last year.

"Earnings don't matter (in cable)," said John Bauer, industry analyst for Oppenheimer & Co. "When a company like Comcast, which has not shown a down quarter in 13 years, decides to take an earnings hit" in order to position itself for the future, the current importance attached to earnings by cable companies is amply demonstrated, he said.

What are important are cash flow margins, continued growth in subscribers and price increases, he said.

Bauer pointed to rises in average cable company stock prices of 40 percent last year as solid evidence that investors are viewing cable's fundamentals favorably. "Those stock prices were not driven by takeover rumors," he said, but by good unit growth and high potential profitability.

Kukowski also pointed to cable's fundamentals as driving the industry's excellent market performance last year. According to analyses conducted by Kidder, Peabody, stock prices for the cable group (weighted on a capitalization basis) rose 40 percent during the first four and one-half months of 1985 compared to a 13 percent rise for Standard & Poor's 500 index, and an 8 percent climb by the Dow Jones industrial average. The industry performed more in line with the rest of the market for the remainder of the year, rising 15 percent compared to 16 percent for the Standard & Poor's index and 25 percent for the Dow Jones.

Kukowski credited much of the movement in stock prices to the high degree of leverage in the group and declining interest rates.

"Clearly the big story (in 1985) is the 40 percent rise (in stock prices) due to the deregulation of rates," she said. Kukowski noted that while cash flows may have come in as expected, cash flow multiples have risen beyond expectations. "Deregulation has prompted the notion that higher, longer term growth rates are attainable" for the industry, she said.

Selected Financial Data

	000s Revenues	% Change	000s Operating Income	% Change	000s Net Income	% Change
Adams-Russell (year end Sept. 29) (3 months Dec. 31)	128,087 34,357	18% 14%	18,637 5,175	20% 15%	9,436 2,390	21% 10.4%
Capital Cities	1,020,000	9%			142,200	5%
Centel	1,033,649	13%			128,743	6%
Comcast	NA		NA		NA	
Disney	2,000,000	22%			173,000	78%
FNN (year end Nov. 30)	12,374	72%			435	NM
Heritage	137,400	22%	21,300 OCF 31,000	26% 29%	8,346	27%
Jones (year end May 31) (6 months Nov. 30)	13,293 8,186	20% 32%	6,662	11%	2,232 942	(16%) (9%)
Knight-Ridder	1,729,613	3%			132,700	(5%)
Media General	378,500	5%			32,824	(17%)
Multimedia	336,271	10%	OCF 113,344	12%	21,838	(36%)
Playboy (year end June 30) (6 months Dec. 31)	192,233 97,973	2% (2%)	(3,204) 13,356)	NM	6,699 (42,610)	(75%) NM
Rogers (Canadian $) (year end Aug. 31) (3 months Nov. 30)	554,165 99,494	20% 18%	128,099 OCF 36,289	40% 46.6%	(22,517) 37,686	
Rollins (year end June 30) (6 months Dec. 31)	500,000 55,708	14%			12,000 6,793	12%
TCA Cable (year end Oct. 31)	43,622	24%	21,302	19%	6,443	15%
TCI (unaudited)	577,170	28.4%	121,094	12%	10,000	(41%)
Time	3,403,554	10%	387,845		199,819	(7%)
Times Mirror	2,969,000	3.7%			237,100	1.8%
Tribune	1,940,000	8%	241,400	28%	123,800	20%
Turner (9 months Sept. 30)	259,400	23%	13,805	71%	(5,001)	NM
UA Communications (year end Nov. 30)	479,847	18%			14,944	(5%)
United (year end May 31) (6 months Nov. 30)	168,996 93,284	20% 14%	68,503 33,756	28% 23%	10,542 4,722	168% 9%
Viacom	444,100	38.6%	OCF 140,700	27%	37,000	21%
Warner	2,234,891	10%	286,534	12%	195,305	NM
Washington Post	1,080,000	10%			114,400	33%
Zenith	1,623,700	(5%)			(7.7)	NM

OCF—operating cash flow
NM—not meaningful. When losses are followed by gains or vice versa for a specific period, percentage difference is not considered meaningful.
Figures in parentheses represent deficits.

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February 1986

$3,400,000

TBA, INC.

Senior Secured Notes for the Leveraged Buyout of the Cable Television Company Serving the City of East Cleveland, Ohio

The Undersigned Arranged for the Placement of These Notes.

CableInvestments, Inc.
8400 East Prentice Avenue, Suite 1115
Englewood, Colorado 80111
(303) 793-3344

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January 1986

Sold

Brammer Cable TV, Inc.

Serving Some 2000 Primary Subscribers in the County of Hancock, and the Communities of Chester, Lawrenceville and Newell, West Virginia.

The Undersigned Represented the Seller.

CableInvestments, Inc.
8400 East Prentice Avenue, Suite 1115
Englewood, Colorado 80111
(303) 793-3344

'Earnings don't matter (in cable).'

—John Bauer

Among the companies surveyed by *CableVision*, Warner Communications stands out as the biggest turnaround story. The company posted $195.3 million in profit in 1985 compared to a loss of $586 million in 1984. The film division and the record division turned in their best performances historically, while the broadcast and cable groups along with reduced interest expense also had a significant impact on 1985 earnings, said Warner Chairman Steven Ross (*CV, 3/3/86, p. 22*). The company recorded a $94.2-million after-tax gain on the sale of MTV Networks and Showtime/The Movie Channel, which was reflected in the company's fourth quarter earnings.

Rogers Cablesystems also shows signs of turning the corner on a poor financial performance. Operating income increased 40 percent to $128 million in 1985 compared to 1984, and losses declined to $22.5 million from $30.8 million. "The margins are up and the losses are coming down. Nineteen eighty-six should be much better (for them)," said Mark Riely, industry analyst for Eberstadt Fleming Inc.

Among the "pure cable" plays, TCI turned in a solid performance with revenues growing 28 percent and cash flows rising 25 percent to $235 million. Andrew Wallach, securities analyst with PaineWebber Mitchell Hutchins, noted the company had pay revenues $6 million below budget in 1985. Yet, because of basic revenues above budget and other factors, operating results for TCI were 97 percent of the budget

forecast. "My feeling is that TCI did a great job in a very tough operating year," he said.

Times Mirror reported that its cable operations showed a 25 percent increase in pre-tax operating income to $47.3 million, while Tribune saw its cable division losses widen to $14.3 million in 1985 from a loss of $5.8 million in 1984. Tribune has sold its cable unit to Jones Intercable.

Heritage Communications performed well last year with revenues up 18 percent and cash flows up 20 percent within the cable group. Per share earnings were down, however, because of increased interest expense and stock issues—the results of an active acquisition and investment campaign.

In fact, many companies saw net income decline as a result of recapitalizations or restructuring. Multimedia's net declined 36 percent to $21.6 million as a result of an $890-million recapitalization program. Media General saw profits decline 17 percent, partly due to a $546,000 charge for the closing of an evening newspaper. Most companies with significant broadcast or newspaper holdings saw only moderate growth in revenues as a result of the soft advertising market, particularly during the second half of 1985.

Viacom's earnings per share also declined because of new stock issues, although the company reported record revenues and earnings for the year. The company's cable television division was no exception. The division turned in record results in 1985 as a result of increased penetration rates and improved productivity, according to the company. Operating profit for the cable division reached $34 million in 1985, up 23 percent from 1984, according to Eberstadt's Riely.

He and other analysts cautioned, however, that as a result of Viacom's extensive acquisition effort in 1985, there is "concern for 1986," he said. Fourth quarter earnings were down, in fact, as a result of increased interest expense and goodwill amortization associated with its acquisitions of MTV Networks and the remainder of Showtime/The Movie Channel.

Cable's other primary provider of pay programming, Time Inc., turned in a 1985 performance that was less than anticipated, analysts said, although they were quick to lay blame on the $13-million fourth quarter charge taken for costs associated with layoffs in the magazine division.

However, it was fundamentals—rising cash flows and the resultant decline in cable company debt levels—that led Donaldson, Lufkin & Jenrette

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Heritage Communications, Inc.

Has Increased Its Investment in

Diversified Communications, Inc.

The Undersigned Initiated This Transaction and Represented Heritage Communications, Inc.

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SOLD

Manchester Cable TV, Inc.

Serving the City of Manchester and County of Coffee, Tennessee

The Undersigned Represented the Seller.

CableInvestments, Inc.
8400 East Prentice Avenue, Suite 1115
Englewood, Colorado 80111
(303) 793-3344

analyst Dennis Leibowitz to predict that the average cable company's public market value would rise by 20 percent in 1987.

Increasing financial strength led to the elimination of Cox Communications from the public markets, said Oppenheimer's Bauer. As cash begins to pile up in a company, the company either becomes an excellent takeover candidate or it launches an acquisition campaign, he said. Since acquisitions often result in the dilution of public stock value, such companies are faced with no-win situations. Since the public markets are no longer needed to generate capital the best alternative is to take the company private, he said.

While the majority of cable operating companies performed well in 1985, continuing difficulties on the hardware side were evident in weak performances by General Instrument and Zenith. According to Zenith's year-end statement, cable sales declined 64 percent to $66 million in 1985 and the division experienced an operating loss for the year compared to a gain last year.

General Instrument's Jerrold Division just announced tne layoff off 12 percent of its staff as revenues and net income have continued their downward slide throughout the year. Scientific-Atlanta, however, has showed modest increases inrevenues and net income over the 1985 calendar year.

—Virginia Munger Kahn

SSS changes name to Tempo Enterprises

TULSA, Okla.—Satellite Syndicated Systems Inc. has changed its name to Tempo Enterprises Inc. The new name along with a title to distinguish one product from another will be used for all company products and services including Tempo Television for Satellite Program Network, Tempo Sound for Star Ship Stereo and Tempo Cable for Cable Southwest.

In existence since 1978, SSS has introduced products and services under separate names into the cable television and satellite communications marketplace. Company officials said it was time to tie all of these various products together under one name to heighten the identity of the total corporation.

Edward Taylor, chairman, president and CEO of the new Tempo Enterprises, said, "While re-evaluating certain business areas we decided the time had come to consolidate and create a more unified corporate image. We felt the best way to do this was to change our name and update our identify."

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Bruce Falkenberg represented the sellers.

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February, 1986

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Pay Per View Supply Chart

A listing of movies and events entering PPV distribution over the next three months.

April

Source

The Annihilators (4/22) — New World
MPAA Rating: R
Cast: Christopher Stone, Andy Wood, Lawrence Hilton-Jacobs, Garrit Graham
Running Time: 86 mins.

Bad Medecin (4/3) — 20th Century-Fox
MPAA Rating: PG-13
Cast: Alan Arkin, Steve Guttenberg, Julie Hagerty
Running Time: 99 mins.

Boys Next Door — New World
MPAA Rating: R
Cast: Maxwell Caulfield, Charlie Sheen, Patti D'Arbanville

Creator (4/1) — Universal
MPAA Rating: R
Cast: Peter O'Toole, Mariel Hemingway
Running Time: 108 mins.

The Glenn Miller Story (4/1) — Universal
MPAA Rating: G
Cast: James Stewart, June Allyson, Louis Armstrong
Running Time: 112 mins.

Grunt — New World
MPAA Rating: R
Cast: "Magic" Schwarz, Steven Cepello, Wally George, Adrian Street

The Journey of Nattie Gann — Disney
MPAA Rating: PG
Cast: Meredith Salenger, John Cusack, Ray Wise, Scatman Corothers
Running Time: 101 mins.

My Man Adam (4/26) — Tri-Star
MPAA Rating: R
Cast: Raphael Sbarge, Page Hannah, Veronica Cartwright, Dave Thomas
Running Time: 85 mins.

National Lampoon's European Vacation (4/16) — Warner Bros.
MPAA Rating: PG-13
Cast: Chevy Chase, Beverly D'Angelo, Dana Hill, Jason Lively
Running Time: 94 mins.

Pee-Wee's Big Adventure (4/16) — Warner Bros.
MPAA Rating: PG
Cast: Pee-Wee Herman, Elizabeth Daily, Mark Holton, Diane Salinger
Running Time: 92 mins.

Witness (4/11) — Paramount
MPAA Rating: R
Cast: Harrison Ford, Kelly McGillis, Alexander Gudonov, Lukas Haas
Running Time: 112 mins.

May

Source

American Flyers (5/23) — Warner Bros.
MPAA Rating: PG-13
Cast: Kevin Costner, Rae Dawn Chong, David Grant, Alexandra Paul
Running Time: 114 mins.

Black Moon Rising — New World
MPAA Rating: R
Cast: Tommy Lee Jones, Robert Vaughn, Bubba Smith
Running Time: 100 mins.

Cocoon (5/1) — 20th Century-Fox
MPAA Rating: PG-13
Cast: Don Ameche, Steve Guttenberg, Maureen Stapleton, Jessica Tandy
Running Time: 118 mins.

Fever Pitch (5/1) — MGM/UA
MPAA Rating: R
Cast: Ryan O'Neal, Catherine Hicks, Chad Everett
Running Time: 95 mins.

The Goonies (5/14) — Warner Bros.
MPAA Rating: PG
Cast: Sean Astin, Josh Brolin, Jeff Cohen, Corey Feldman, Martha Plimpton, Ke Huy Quan
Running Time: 114 mins.

To Live & Die in L.A. (5/1) — MGM/UA
MPAA Rating: R
Cast: William Peterson, Willem Defoe, John Pankow
Running Time: 116 mins.

Macaroni (5/16) — Paramount
MPAA Rating: R
Cast: Jack Lemmon, Marcello Mostrianni
Running Time: 103 mins.

Pinocchio — Disney
MPAA Rating: G
Cast: Animated
Running Time: 88 mins.

Rocky IV — United Artists
MPAA Rating: PG
Cast: Sylvester Stallone, Talia Shire, Dolf Lundgren, Carl Weathers
Running Time: 92 mins.

Sesame Street Presents: Follow That Bird (5/14) — Warner Bros.
MPAA Rating: G
Cast: Jim Henson's Sesame Street Muppets
Running Time: 84 mins.

White Nights (5/1) — Columbia
MPAA Rating: PG-13
Cast: Mikhail Barishnikov, Gregory Hines
Running Time: 135 mins.

June

Source

Beginner's Luck — New World
MPAA Rating: R
Cast: Sam Rush, Riley Steiner, Kate Talbot
Running Time: 85 mins.

House — New World
MPAA Rating: R
Cast: William Katt, George Wendt, Richard Moll, Kay Lenz
Running Time: 93 mins.

James Joyce's Women (6/1) — Universal
MPAA Rating: NR
Cast: Fiunula Flanagan
Running Time: 91 mins.

Jewel of the Nile — 20th Century-Fox
MPAA Rating: PG
Cast: Michael Douglas, Kathleen Turner, Danny DeVito
Running Time: 105 mins.

Mishima: A Life In Four Chapters (6/18) — Warner Bros.
MPAA Rating: R
Cast: Ken Ogata, Kenji Sawada, Masayuki Shionoya
Running Time: 121 mins.

Murphy's Romance (6/1) — Columbia
MPAA Rating: PG-13
Cast: James Garner, Sally Field
Running Time: 107 mins.

Protector (6/18) — Warner Bros.
MPAA Rating: R
Cast: Jackie Chan, Danny Aiello, Roy Chiao, Victor Arnold
Running Time: 95 mins.

16 Days of Glory — Paramount
MPAA Rating: G
Cast: Various 1984 Olympic Athletes
Running Time: 145 mins.

That Was Then, This is Now — Paramount
MPAA Rating: R
Cast: Emilio Estevez, Craig Sheffer, Kim Delaney
Running Time: 102 mins.

Uforia (6/1) — Universal
MPAA Rating: PG
Cast: Cindy Williams, Harry Dean Stanton
Running Time: 94 mins.

Film information provided to International Thomson Communications Inc. by studios.

Franchising calendar

This chart examines the franchise status of communities since March 1986.

California

Cerritos—request for proposals issued.
Chino—award to Marsh Media.
Claremont—tentative agreements to award franchise to Masada Corp.
East Yolo—award to Sonic Cable 7/85 (10,000 homes).
La Puente—award to United Cable 11/28/84 (8,600 homes).
Los Altos—awarded to United Cable 12/84 (9,000 homes).
Palo Alto—awarded 10/7/85 to Cable Communications Cooperative of Palo Alto.
Rosemead—award to Falcon Communications 2/26/85 (14,000 homes).
South Monrovia—award to Falcon Communications 9/18 (5,400 homes).

Dolaware

Wilmington—commission's recommendation under review by City Council.

District of Columbia

Washington, D.C.—award to District Cablevision 7/10/84 (254,000 homes).

Illinois

Chicago—Area I award to Communications and Cable (300,000 homes).
Countryside—award to Cablevision of Chicago 6/13/84 (2,200 homes).
Elmwood Park—award to Continental Cable 12/17/84 (9,500 homes).
Naperville—award to Rite Cable Co. of Illinois Limited. Rite Cable of Illinois also awarded unincorporated areas of DuPage County. (17,500 homes).
St. Charles, Geneva—award to Centel 7/2/84 (10,000 homes).
Wheaton—award to Centel 7/2/84 (16,000 homes).
Winnetka—survey showed interest in cable insufficient to warrant franchise.
Woodbridge—terminated franchising process (260 homes).

Kentucky

Fulton—award to TCI 12/13/84 (2,400 homes).
Loretto—terminated franchise process.
New Haven—award to First PIC.

Maryland

Baltimore—award to United Cable 12/19/84 (302,000 homes).

Missouri

St. Louis—award to STL Cablevision Partners Inc. (75% of city) and St. Louis City Communications (25% of city) 4/11/84 (178,000 homes).

New York

Mt. Upton—terminated franchise process.
North Salem—award to Community Cable Services 12/84 (1,100 homes).
Portland—cable committee formed to begin franchise process. Tribune Cable, Harborview and U.S. Cable sent letters expressing interest (150 homes).

North Carolina

Davie County—award to Summit Cable.
Jackson—award to Cable East (400 homes).

Ohio

Avon—award to Space Cable of Ohio 4/84 (2,000 homes).
Cleveland—franchise awarded to Northcoast Cable 7/85.
Oberlin—preliminary award to Oberlin Cable Co-op 6/6/84 (2,600 homes).

Oregon

Dunthorpe—no response to RFP.
Sylvan—awaiting additional legal opinions.

Pennsylvania

Philadelphia—city is divided into four areas; Area I award to Greater Philadelphia Cablevision; Area II award to Wade Communications; Area III award to Rollins; Area IV award to Comcast 11/84 (each area: 155,000 homes).

Rhode Island

Naval Education and Training Center—accepting proposals (2,900 homes).
Newport (Area 7 includes Middletown, Portsmouth, Tiverton, Little Compton) —Bellevue Cablevision Inc. awarded franchise. (29,500 homes).

Virginia

Manassas—negotiating with Cablevision of Manassas.

Washington

Battle Ground—new ordinance drafted. Soliciting interest from operators.
Seattle—city is divided into four parts; Group W, Viacom and Seattle Community Cablevision serve overlapping sections of three parts; part IV is beginning franchising process.

Source: International Thomson Communications Inc.

Franchising in the top 50 markets

Rank	Market	Status of core city
1.	New York	Manhattan—2-OP; outer boroughs 8-FG
2.	Los Angeles	City is divided into 14 areas (A-n); 11-OP, 3-UC
3.	Chicago	City is divided into five areas; Area I-FG, Areas II, III-OP, Areas IV, V-FG
4.	Philadelphia	City is divided into four areas: Areas I, II, III, IV-FG
5.	San Francisco	OP (system to be upgraded)
6.	Boston	OP
7.	Detroit	FG
8.	Washington, D.C.	FG
9.	Cleveland	RP
10.	Dallas/Ft. Worth	Two systems-OP
11.	Houston	Two systems-OP
12.	Pittsburgh	OP
13.	Miami	OP
14.	Seattle/Tacoma	City is divided into five parts: (4-OP), (1-BP); Tacoma-OP
15.	Minneapolis/St. Paul	OP/UC
16.	Atlanta	OP
17.	St. Louis	OP/UC
18.	Tampa/St. Petersburg	OP/OP
19.	Denver	OP
20.	Baltimore	FG
21.	Sacramento/ Stockton	OP/OP
22.	Indianapolis	Two systems-OP
23.	Portland	Three systems-OP
24.	Phoenix	Three systems-OP
25.	Hartford/ New Haven	Two systems-OP
26.	Cincinnati	OP
27.	San Diego	Two systems-OP
28.	Kansas City	OP
29.	Milwaukee	OP
30.	Nashville	OP
31.	Charlotte	OP
32.	Buffalo	OP
33.	Providence/ New Bedford	OP/OP
34.	Orlando/ Daytona Beach	Two systems-OP
35.	New Orleans	OP
36.	Memphis	OP
37.	Columbus	Four systems-OP
38.	Greenville/Asheville/Spartansburg	Three systems-OP
39.	Grand Rapids/ Kalamazoo/ Battle Creek	Three systems-OP
40.	Birmingham	OP
41.	Raleigh/Durham	Two systems-OP
42.	Oklahoma City	Two systems-OP
43.	Louisville	Two systems-OP
44.	Salt Lake City	OP
45.	San Antonio	OP
46.	Charleston/ Huntington	Two systems-OP
47.	Norfolk/Newport News/New Hampton/Portsmouth	Four systems-OP
48.	Harrisburg/York/ Lebanon/Lancaster	Four systems-OP
49.	Wilkes Barre/ Scranton	Two systems-OP
50.	Albany/Schenectady/Troy	Three systems-OP

Legend

OP — operational
UC — under construction
FG — franchise granted
FP — franchise pending
PS — proposal submitted
RP — request for proposals issued
RPP — request for proposals pending
MO — considering municipal ownership
BP — beginning process

Source: International Thomson Communications Inc.